# RONALD M. FINKELSTEIN, CPA*

PARTNER ▶ TAX & BUSINESS SERVICES

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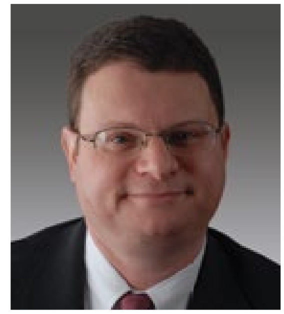

Ronald M. Finkelstein is a Tax Partner in the Firm's Long Island office and national Co-Partner-in-Charge of the Trusts and Estates Practice group. His extensive experience as an attorney and certified public accountant helps clients address their estate planning needs and make informed decisions for the future of their families and their businesses. As a trusted advisor to fiduciaries and estate and trust beneficiaries, Mr. Finkelstein handles all aspects of estate and trust administration.

A recognized authority on trust and estate issues, Mr. Finkelstein frequently lectures on topics relating to fiduciary income tax, trusts and estates matters and individual retirement account planning. Additionally, he has authored several articles for various industry and regional publications and has been quoted in the New York Daily News, Newsday, Practical Accountant and Long Island Business News on taxation issues.

Prior to joining the Firm in 2001, Mr. Finkelstein spent 14 years as an attorney counseling individuals, business owners and fiduciaries with trust and estate matters.

## Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
New York State Society of Certified Public Accountants (NYSSCPA),
  Nassau County Chapter, President
  Nassau County Chapter Taxation Committee, Past Co-Chair
New York State Bar Association (NYSBA),
  Estate and Trust Administration Committee, Vice Chair

## Articles & Presentations

Even Fiduciaries Have to Pay the Piper: A How-To Guide to the Income Taxation of Trusts and Estates, Herald National Bank, 2010
Tax Aspects of Divorce, NYSSCPA Nassau County Chapter, 2009
1041 Review & Updates, National Conference of CPA Practitioners, 2009

## Awards & Honors

Fifty Around 50, Long Island Business News, 2010

*Licensed by the State of New York

## EXPERTISE

- Estate Planning
- Business Succession Planning
- Estate & Trust Administration
- Estate, Gift & Fiduciary Income
- Tax Returns
- Retirement Planning

## INDUSTRY FOCUS

- High-Net-Worth Individuals & Families
- Closely-Held Business Owners
- Executors & Trustees
- Estate & Trust Beneficiaries

## EDUCATION

- Juris Doctor
  New York Law School
- Bachelor of Science, Accounting
  New York University

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